Chapter 4

Training Completions and Evaluations

Chapter Overview

Introduction

This chapter explains the processes related to documenting training completions and evaluations and required training to include updating the employee's record. It also includes retrieving required and completed training, and attendee lists.

See Also

Module 1, Fundamentals of the Modern DCPDS
- Chapter 6, Retrieving Records
- Chapter 7, Folders

Module 7, Employee Training and Development Using the Modern DCPDS
- Chapter 1, Requesting Training
- Chapter 2, Administering Training
- Chapter 3, Managing Enrollments, Cancellations, and Attendance
  - Section: Enrolling an Employee
- Chapter 6, Reports

Chapter Contents

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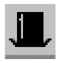
Chapter Overview, Continued

Who Does It



Components will determine who has this responsibility.

Before You Begin

- Employee’s training history, both completions and non-completions will be recorded in Oracle HR, **People** Window (Special Information Type), when you document it in OTA.
- Before training is recorded in OTA, business rules require course evaluations by both the employee and supervisor be completed. Once the evaluations have been completed, the Evaluation report is set to run daily, and the enrollment status is shown as completed.
- Each location, normally the OTA Training Administrator, must set up daily Reports to run Course Evaluations for the employees on the day after a course is scheduled to complete. **This is a one-time set up**. See Chapter 6 for instructions.
- Although every employee is scheduled to have a log on and ID capability, all may not have immediate access to a PC. In the cases where an employee does not have a Civilian Inbox, the evaluation will be sent to the supervisor or training monitor as determined by the Component.

Managing Completions and Evaluations

Purpose

This section will show you how both evaluations and completion certifications are processed by the employee and supervisor prior to forwarding for inclusion in the employee's record. On the day after graduation of the Event, OTA will flow the Employee Course Evaluation to the appropriate person.

To the employee, who will	Then
• Annotate training was completed. • Complete the **Course Evaluation.**	Forward to the supervisor for completion of the Manager Evaluation.
Then	
The supervisor will: • Complete **Manager Course Evaluation**. • **Certify completion**. • **Save**. • Completed Training in HR will be updated.	**If training was not completed, the supervisor will:** • Notify appropriate personnel.

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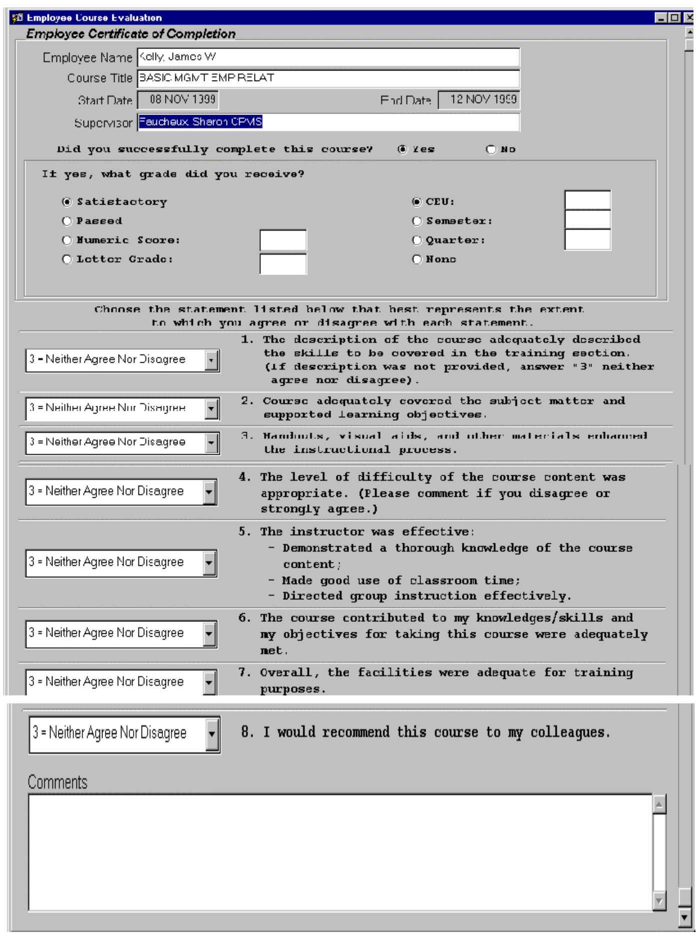
Managing Completions and Evaluations, Continued

Completing the Evaluations

This describes the procedures that employees and managers will normally follow in completing a course evaluation.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>On the day after graduation, the Employee Course Evaluation will display in the Training Contact or the employee’s Civilian Inbox. If the employee does not have a Civilian Inbox, the Evaluation can be forwarded to the employee by

Email, or
A printed copy from OTA can be provided, or
The employee can complete the evaluation on the Training Contact’s computer.



</td></tr>
</table>

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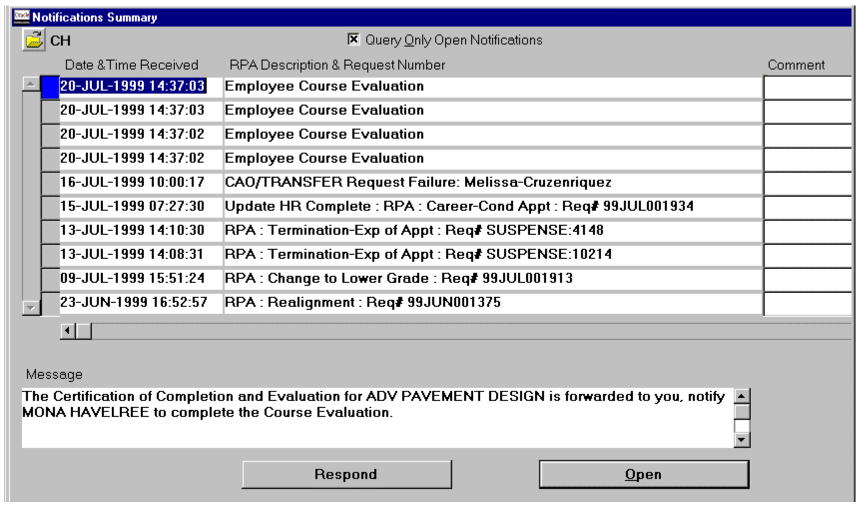
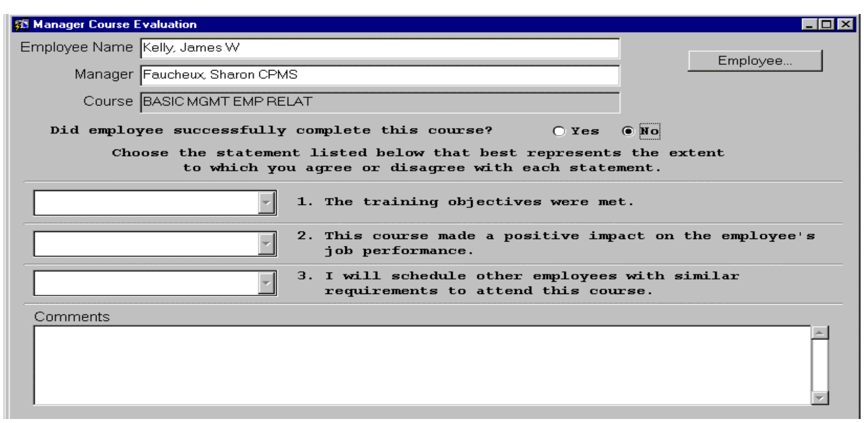
Managing Completions and Evaluations, Continued

Completing the Evaluations (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>The employee completes the Evaluation, saves it, and forwards it to the manager/supervisor by selecting a name from the LOV. The Manager/Supervisor receives it and clicks <Respond> to open and complete the Manager Course Evaluation.



</td></tr>
<tr><td>3</td><td>The supervisor responds to the question, “Did the employee successfully complete this course?” by clicking the Yes or No button.</td></tr>
<tr><td>4</td><td>The supervisor responds to the three statements on the Evaluation using the drop down menu for each and places any free-flow remarks in the Comments fields.



</td></tr>
</table>

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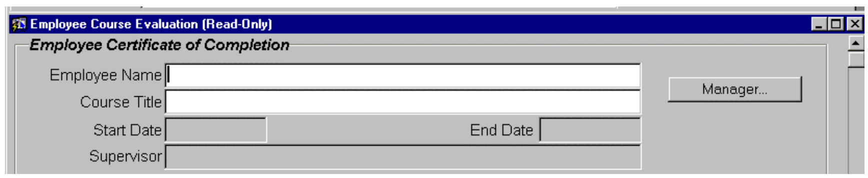
Managing Completions and Evaluations, Continued

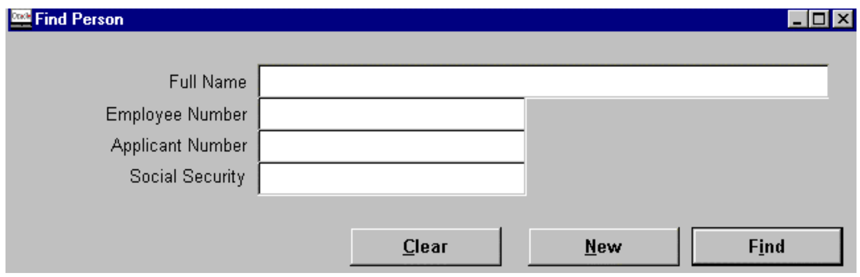
Completing the Evaluations (continued)

Step	Action
5	If the supervisor needs to view the Employee Evaluation, the supervisor clicks the **<Employee>** Taskflow Button on the **Manager Course Evaluation** Window. The Employee Course Evaluation displays. The Employee Course Evaluation now has a <**Manager>** Taskflow Button that is used to toggle back to the **Manager Course Evaluation** Window. 
6	Once the supervisor completes the evaluation, certifies completion, and saves it, the training occurrence will flow to HR Completed Training. **Note:** The Evaluation(s) flow to the HR office that initiated the report. It does not display in a Civilian Inbox. Personnel in the HR office can access and print the Evaluations by going to the **Navigation List** and clicking *Employee Course Evaluation* or *Manager Course Evaluation*. Scroll through all evaluations by placing your cursor in the ***Course Title*** data field of the ***Employee Course Evaluation*** and clicking the Page Up/Down keys.

Recording Completed Training in HR

Recording Completed Training in HR

This procedure is for documenting training not completed through the OTA process; e.g., self-development, completed at another Component and not recorded.

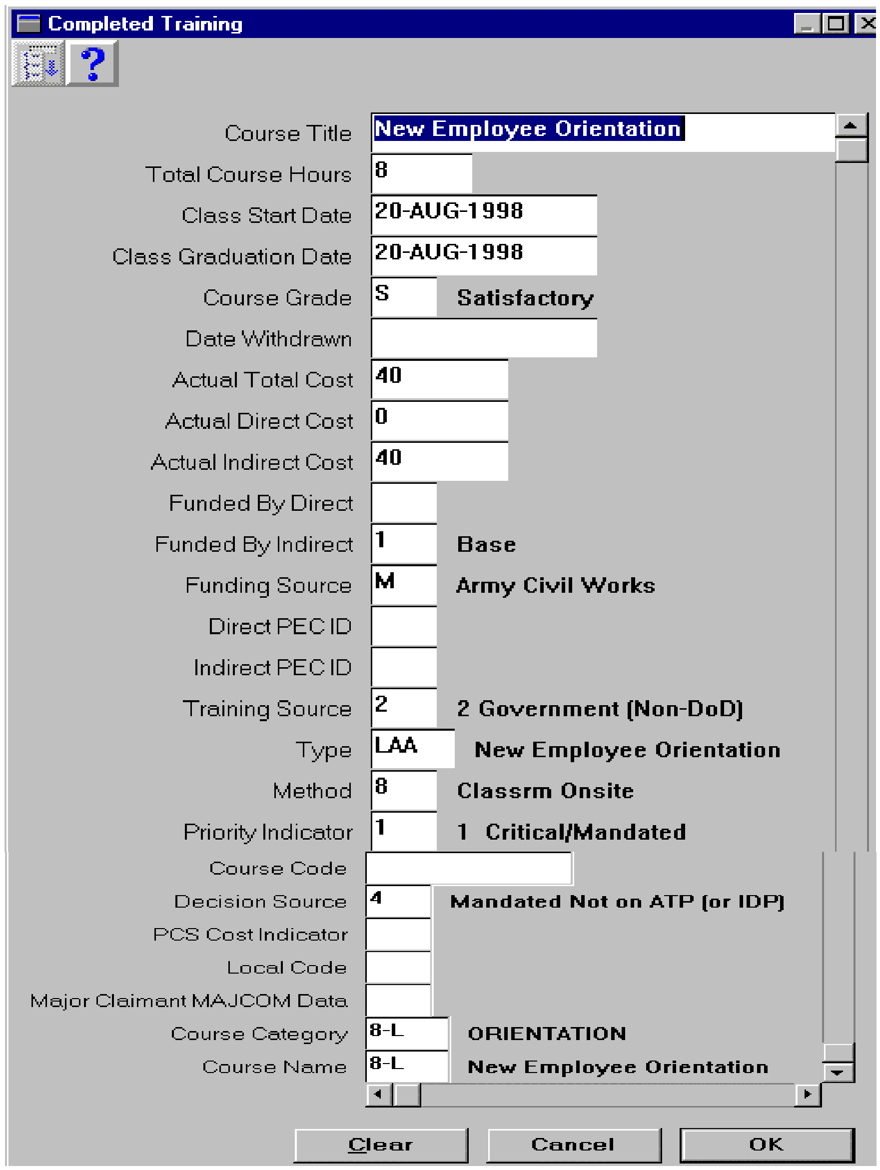
Step	Action
1	On the **Navigation** Window → *SIT Completed/Required Training* → **<Open>**.
2	The **Find Person** Window displays. With the cursor in **the *Full Name*** data field, click the LOV and click the employee's name. Click **<OK>**. 
3	The **Full Name** and **Employee Number** fields populate. Click **<Find>**.
4	The **People** Window displays with the data fields populated. Click **<Special Info>**.
5	The **Special Information** Descriptive Flexfield displays. Use the left scroll bar to select ***Completed Training***. Click the ***Detail*** data field to display the employee's completed training.

Continued on next page

Recording Completed Training in HR, Continued

Recording Completed Training in HR (continued)

Step	Action
6	The **Completed Training** Descriptive Flexfield displays. Use the LOV to input the following data fields: **Note:** Not all fields need to be completed. Each Component selects the items required by their training policy.



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Recording Completed Training in HR, Continued

Recording Completed Training in HR (continued)

Step	Action
6 (cont)	

Data Field	Description/Action
Course Title (120 characters)	Type the title in ALL CAPS.
Total Course Hours	Total for duty and non-duty.
Class Start Date	Type in the date.
Class Graduation Date	Type in the date.
Course Grade	Click the LOV to select the letter grade.
Date Withdrawn	Type in the date, if appropriate.
Actual Total Cost	Total of Direct and Indirect Cost.
Actual Direct Cost	Type in dollar amount.
Actual Indirect Cost	Type in dollar amount.
Funded by Direct	Click the LOV to make a selection.
Funded by Indirect	Click the LOV to make a selection.
Funding Source	Click the LOV to make a selection.
Direct PEC ID (AF use)	Type in the number.
Indirect PEC ID (AF use)	Type in the number.
Training Source	Click the LOV to make a selection.
Type	Click the LOV to make a selection.
Method	Click the LOV to make a selection.
Priority Indicator	Click the LOV to make a selection.
Course Code	Optional use.

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Recording Completed Training in HR, Continued

Recording Completed Training in HR (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6
(cont)</td><td>
<table>
<tr><th>Data Field</th><th>Description/Action</th></tr>
<tr><td>Decision Source</td><td>Click the LOV to make a selection.</td></tr>
<tr><td>PCS Cost Indicator</td><td>Click the LOV to make a selection.</td></tr>
<tr><td>Local Code</td><td>Optional use.</td></tr>
<tr><td>Major Claimant MAJCOM Data</td><td>Optional use.</td></tr>
<tr><td>Course Category</td><td>Click the LOV to make a selection.</td></tr>
<tr><td>Course Name</td><td>Grayed out.</td></tr>
</table>
</td></tr>
<tr><td>7</td><td>Click <OK>. The completed course displays in the Details Region of the Special Information Window. Click Save on the Toolbar.

Note: You may record incomplete training, using the same DDF by typing in the Date Withdrawn, and selecting from the LOV (Incomplete, No Show, or Unsatisfactory) for the Course Grade data field.</td></tr>
</table>

Recording Required Training in HR

Purpose

This section will show you how to record or update Required Training in HR.

In This Section

The following topics are covered in this section.

- Accessing the People Window
- Recording Required Training

See Also

Module 7, Employee Training and Development

Chapter 4, Training Completions and Evaluations

Sections: Managing Completions and Evaluations

Recording Completed Training History in HR

Who Does It

Components will determine who has access to employee records.

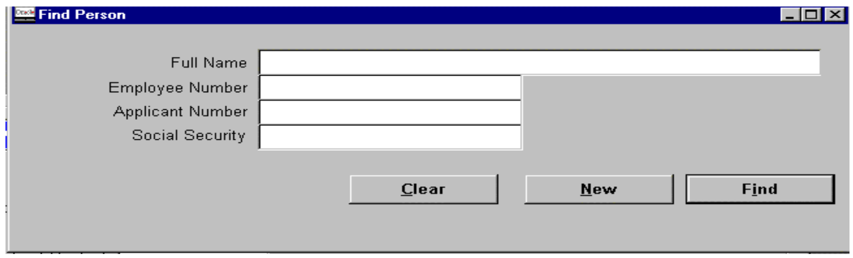
Accessing the People Window

Step	Action
1	On the **Navigation** Window → *SIT Completed/Required Training* → **<Open>**.

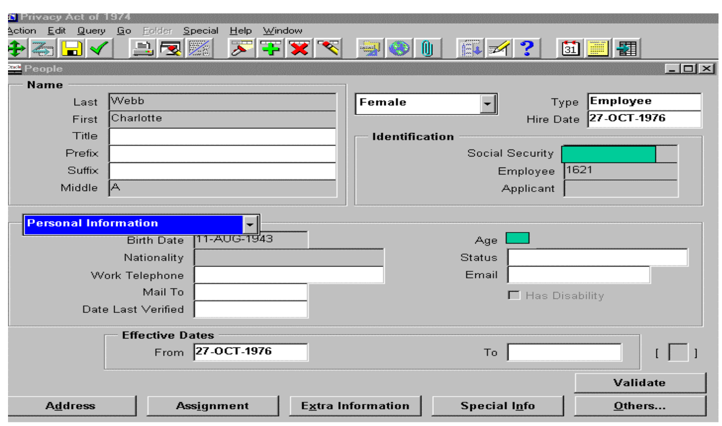
Continued on next page

Recording Required Training in HR, Continued

Accessing the People Window (continued)

Step	Action
2	The **Find Person Window** displays. With the cursor in the ***Full Name*** data field, click the LOV and highlight the employee's name. Click <**OK**>. 
3	The ***Full Name*** and ***Employee Number*** data fields populate. Click <**Find**>. The **People** Window displays.

Recording Required Training

Step	Action
1	The **People** Window populates with Name and other employee information. Click <**Special Info**>. 

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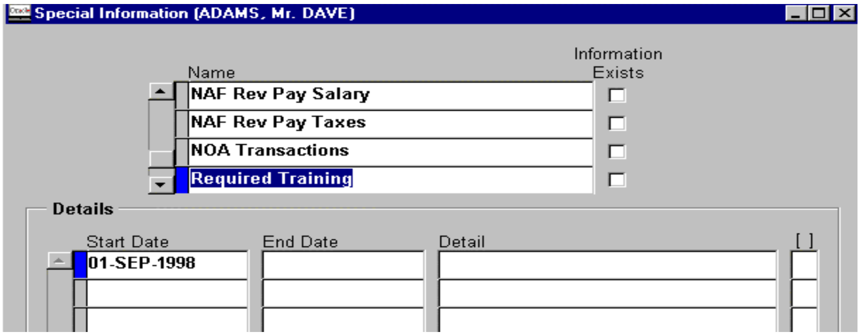
Recording Required Training in HR, Continued

Recording Required Training (continued)

Step	Action
2	The **Special Information** Descriptive Flexfield displays with the employee name on the Title Bar. Use the left scroll bar next to the ***Name*** data field to select Required Training or press F7, type Required%, and press F8 on your keyboard. An "X" in the ***Information Exists*** checkbox indicates that Required Training has been inputted. The **Details** Region indicates the Start and End Date of the ***Required Training***, a Detail column, and a blank Descriptive Flexfield. Place your cursor in the ***Detail*** data field in the **Details** Region and double click. The ***Required Training*** Descriptive Flexfield displays. 

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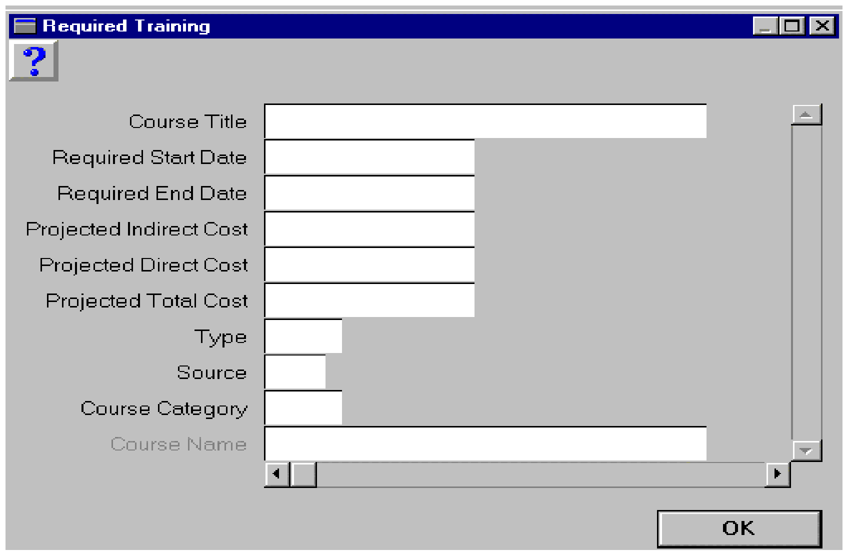
Recording Required Training in HR, Continued

Recording Required Training DDF

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>On the Required Training Descriptive Flexfield, click the LOV to input the needed data:



<table>
<tr><th>Data Field</th><th>Description/Action</th></tr>
<tr><td>Course Title</td><td>Click the LOV.</td></tr>
<tr><td>Required Start Date</td><td>Type in the date.</td></tr>
<tr><td>Required End Date</td><td>Type in the date.</td></tr>
<tr><td>Projected Indirect Cost</td><td>Type in dollar amount.</td></tr>
<tr><td>Projected Direct Cost</td><td>Type in dollar amount.</td></tr>
<tr><td>Type</td><td>Click the LOV.</td></tr>
<tr><td>Source</td><td>Click the LOV.</td></tr>
<tr><td>Course Category</td><td>Click the LOV.</td></tr>
<tr><td>Course Name</td><td>Click the LOV.</td></tr>
</table>
</td></tr>
<tr><td>2</td><td>Click <OK>. The <i>Detail</i> data field populates with a string of data.</td></tr>
<tr><td>3</td><td>Click Save on the Toolbar.</td></tr>
</table>

Retrieving Completed/Required Training in HR

Purpose

This section will show you how to retrieve Completed and Required training information from Oracle HR. These retrievals can be accomplished for a specific employee's record or for a list of employees with similar training experiences.

In This Section

The following topics will be covered in this section.

- Accessing the **People** Window
- Retrieving Employee's Training Data
- Retrieving Completed Training for a List of Employees

See Also

Module 1, Fundamentals of the Modern DCPDS
Chapter 6, Retrieving Records

Who Does It

Components will determine level of access to employee records.

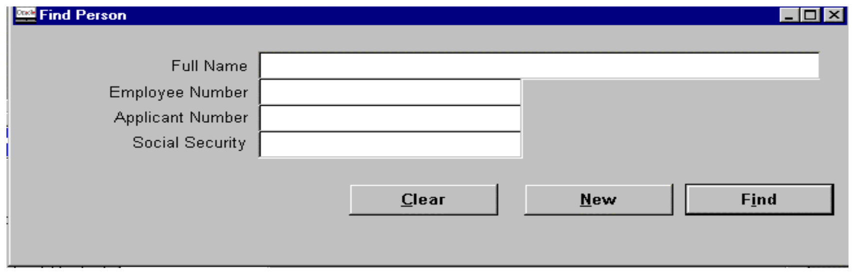
Before You Begin

The Completed Training and Required Training are in Oracle HR and can be accessed through the *Special Information Type (SIT*) on the OTA **Navigation List**.

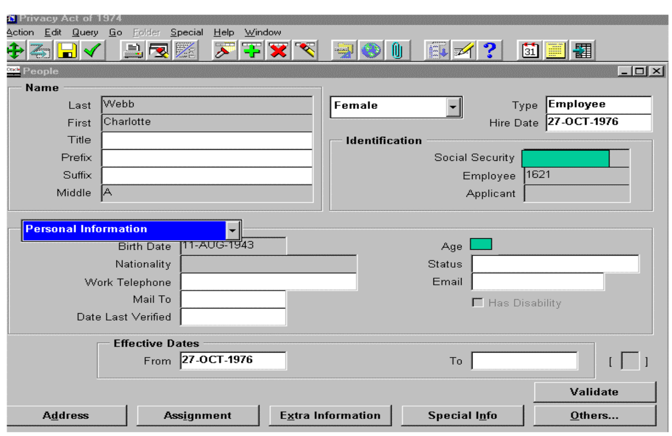
Continued on next page

Retrieving Completed/Required Training in HR, Continued

Accessing the People Window

Step	Action
1	On the **Navigator** Window → *SIT Completed/Required Training* → <**Open**>.
2	The **Find Person Window** displays. With the cursor in the ***Full Name*** data field, click the LOV, and click the employee's name. Click <**OK**>. 
3	The ***Full Name*** and ***Employee Number*** data fields populate. Click <**Find**>. The **People** Window displays.

Retrieving Training Data on Individual Employees

Step	Action
1	The **People** Window populates with ***Name*** and other employee information populated. Click <**Special Info**>. 

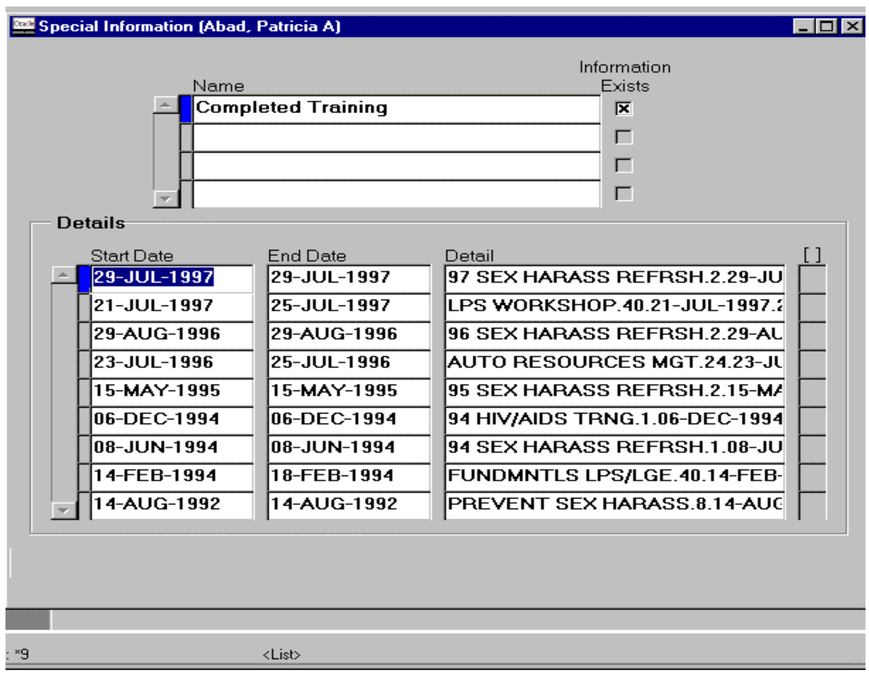
Continued on next page

Retrieving Completed/Required Training in HR, Continued

Retrieving Training Data on Individual Employees (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>

The **Special Information** Descriptive Flexfield Window displays with the employee name on the Title Bar. Use the left scroll bar next to the ***Name*** data field to select ***Completed Training*** or ***Required Training*** or do a query (click F7, type Completed%, and click F8).



To count the total number completing the training, click Query on the Toolbar, then click Count Matching Records. The Message Bar gives you the total count.

</td></tr>
<tr><td>3</td><td>

If the ***Information Exists*** checkbox is selected, data is available.

The **Details** Region indicates the ***Start and End Date*** data fields of the Completed Training. There is a ***Detail*** data field and a blank DDF. Place your cursor in the ***Detail*** data field in the **Details** Region and click.

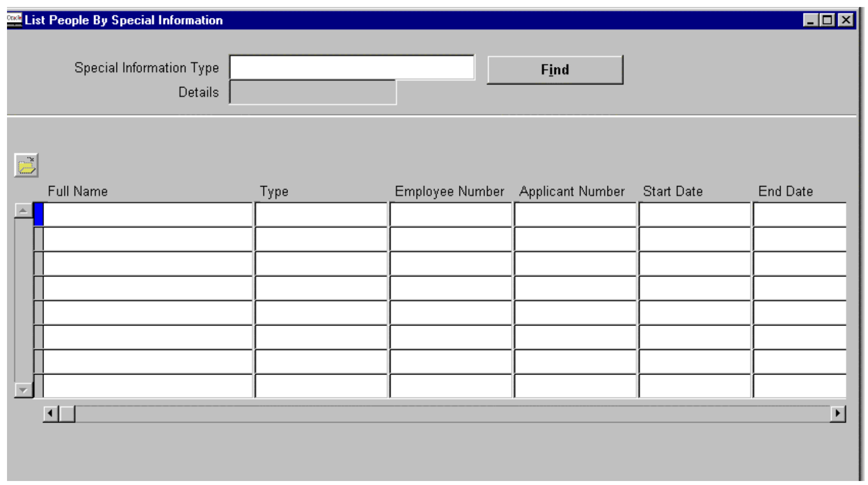
Note: Since only eight entries display on the window, the count at the bottom of the window shows the total number of completions.

</td></tr>
<tr><td>4</td><td>The Completed Training DDF displays with completed training or required training data.</td></tr>
<tr><td>5</td><td>Take action as needed. Exit the window.</td></tr>
</table>

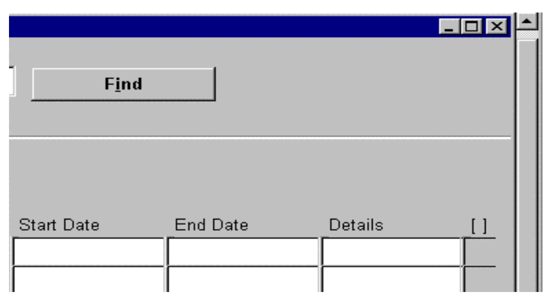
Retrieving Completed Training in HR for a List of Employees

Retrieving Training for a List of Employees

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>On the Navigation Window → View → List → People by Special Information Type → <Open>.</td></tr>
<tr><td>2</td><td>The List People by Special Information Window displays with nine data fields and a blank Descriptive Flexfield.



Click the bottom scroll bar to view the second half of the window:



</td></tr>
<tr><td>3</td><td>With your cursor in Special Information Type data field, click the LOV. (The shortcut method is to input %Completed Training% or %Required Training% in the data field and click Enter.)</td></tr>
</table>

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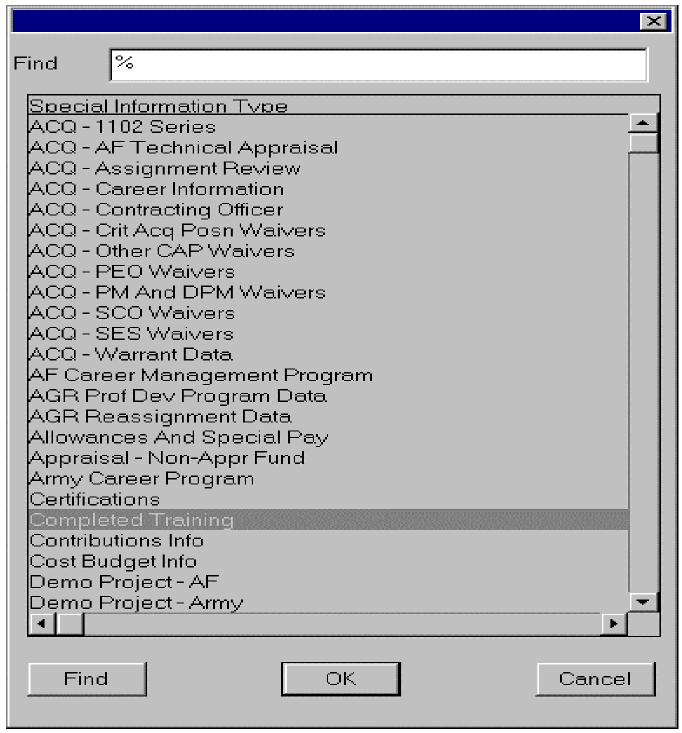
Retrieving Completed Training in HR for a List of Employees,
Continued

Retrieving Training for a List of Employees (continued)

Step	Action
4	Select ***Completed Training*** or ***Required Training*** from the LOV and click **<OK>**. 
5	The Special Information Type field populates with ***Completed Training*** or ***Required Training***. Click the Details data field.

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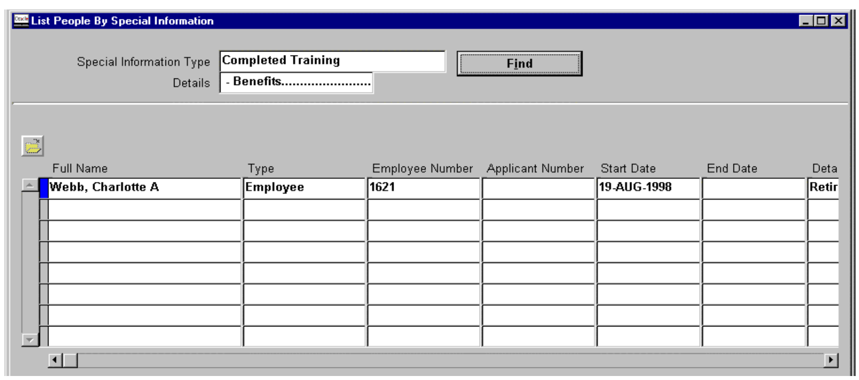
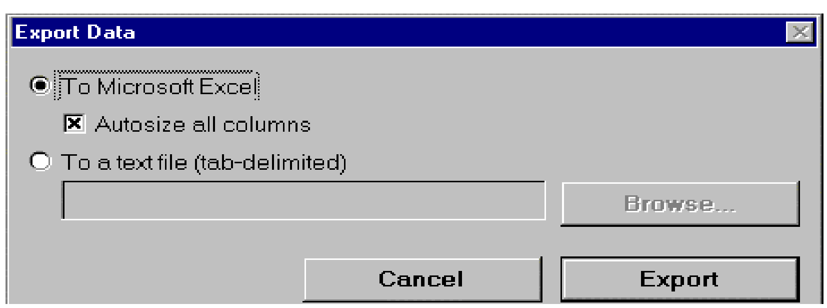
Retrieving Completed Training in HR for a List of Employees,
Continued

Retrieving Training for a List of Employees (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>The Completed Training or Required Training DDF displays.</td></tr>
<tr><td>7</td><td>Type a Course Title and click <OK>. This returns you to the List People by Special Information Window. Click <Find> located next to the <i>Special Information Type</i> data field.</td></tr>
<tr><td>8</td><td>The List People by Special Information Window displays populated with the course title selected. If you want to print a copy, you may want to export the names into an Excel spreadsheet; otherwise, you can print only eight attendees at a time.



</td></tr>
<tr><td>9</td><td>Click Action on the Main Menu and click Export. The Export Data Window displays.



</td></tr>
<tr><td>10</td><td>Click <Export>. Follow the Excel spreadsheet procedures for sorting and printing.</td></tr>
</table>

Obtaining a List of Attendees

Purpose

This procedure will guide you through the steps to obtain a list of attendees for a specific Event and their status.

See Also

Module 1, Fundamentals of the Modern DCPDS
Chapter 7, Folders
Module 7, Employee Training and Development Using the Modern DCPDS
Chapter 4, Completions and Evaluations
Section: Managing Course Completions and Evaluations

Who Does It

Components will determine the level of access to employee records.

Before You Begin

The list of attendees can be used for:

- Class rosters for classroom instructors.
- Alternates **Wait Listed** for an Event.
- Reports.

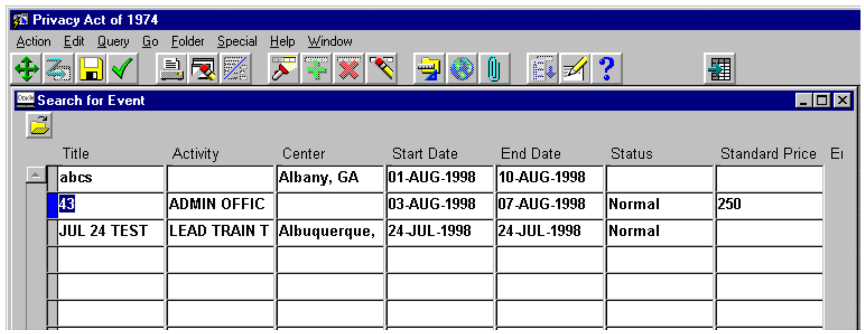
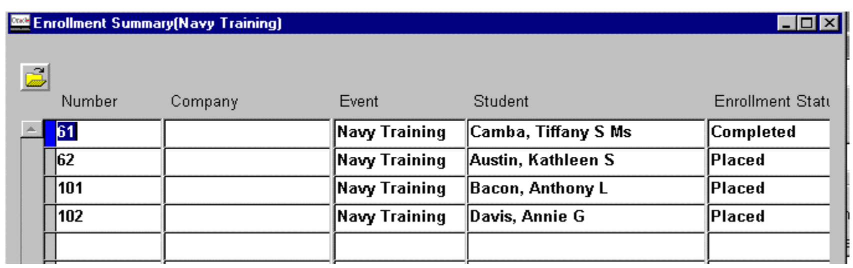
Obtaining a List of Attendees

Step	Action
1	On the **Navigation List** → *Enrollments* → *Student* → **<Open>**. The **Search for Event** Window displays.

Continued on next page

Obtaining a List of Attendees, Continued

Obtaining a List of Attendees (continued)

Step	Action
2	Query the **Search for Event** Window to locate the Event. With the **Current Record Indicator** on the Event you need, exit the window. 
3	The **Enrollment Summary** Window populates with the *Students* and *Event*. The Event Title also displays on the Title Bar. The status of each student; e.g., Completed and Placed, is shown in the *Enrollment Status* column.  **Note:** As the window displays only eight names at a time, click Query on the Main Menu and click Count Matching Records. The number displays at the bottom of the window.
4	If you want to sort the attendees by Enrollment Status before your next action, remember you can sort only the first three columns. Click the **Folder Tools** button on the Toolbar, which becomes enabled when you navigate to a folder block.

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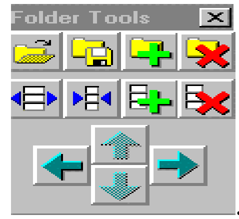
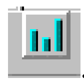
Obtaining a List of Attendees, Continued

Obtaining a List of Attendees (continued)

Step	Action
5	The **Folder Tools Palette** displays . To move a data field, click in the data field and then click the Move Left button on the Palette. Only the first three data fields can be sorted so move the Enrollment Status to one of the first three positions.
6	Click **Folder** on the Main Menu and click **Show Order By**. You will now see an **Order By** button under each of the first three data fields . Click the button of a data field you want to sort. Click the button again until the message line displays the desired sort setting: • Ascending • Descending • No Ordering **Note:** If you define multiple sorts, the records display in the order of the first data field's sort. Then, within that first sort order, the records display by the sort in the second data field and so on for the third data field.
7	Since you can print only eight attendees at a time, you may want to export the names into an Excel spreadsheet.

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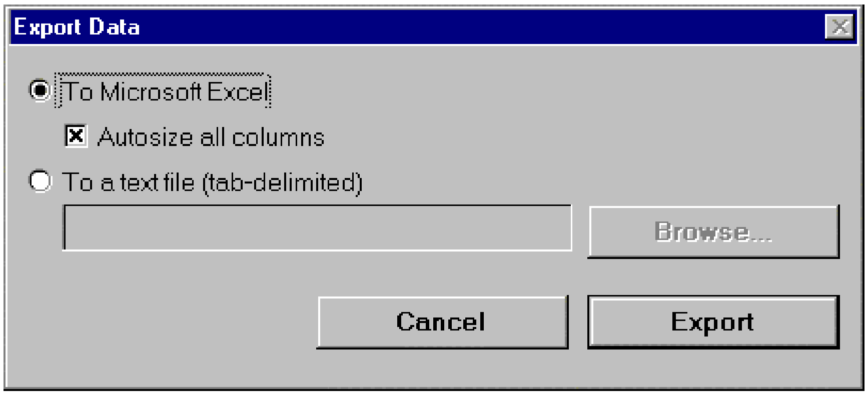
Obtaining a List of Attendees, Continued

Exporting Names into a Spreadsheet

Step	Action
1	Click **Action** on the Main Menu and click **Export**. The **Export Data** Window displays. 
2	Click **<Export>**. A Progress Message displays. Once the names populate, follow Excel spreadsheet procedures for sorting and printing.